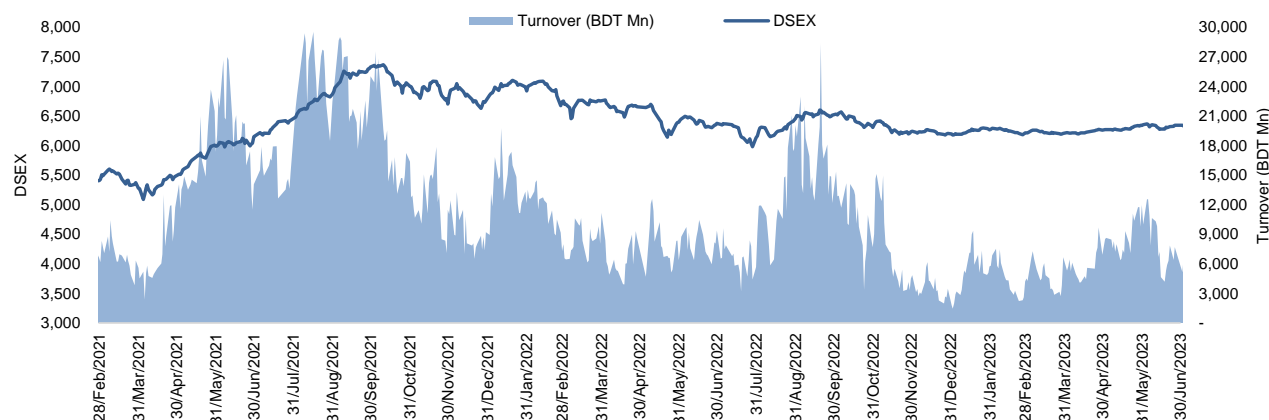


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.10%) lost 6.26 points and closed at 6,361.16. The blue-chip index DS30 (-0.11%), the Shariah-based index DSES (-0.04%), and the large-cap index CDSET (+0.04%) closed at 2,200.36, 1,386.77, and 1,215.03 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.29% followed by NBF1 (+0.14%), Pharmaceutical (+0.06%). Fuel & Power experienced the highest loss of 0.09% followed by Engineering (-0.08%), Food & Allied (-0.04%). Block trades contributed 7.9% of the overall market turnover. Fu Wang Food Ltd. (-8.0%) was the most traded share with a turnover of BDT 817 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,361.16	6,367.42	-6.26	-0.10%	+2.5%
DS30	2,200.36	2,202.89	-2.53	-0.11%	+0.2%
DSES	1,386.77	1,387.30	-0.53	-0.04%	+2.1%
CDSET	1,215.03	1,214.49	+0.54	+0.04%	+0.1%

	Advanced	Declined	Unchanged	Total
All Category	83	116	169	368
A Category (Equity)	48	63	123	234
B Category (Equity)	27	45	34	106
N Category (Equity)	2	2	1	5
Z Category (Equity)	6	6	11	23
Mutual Funds	3	0	20	23
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,611,685	7,624,803	-0.2%
	Mn USD	70,154	70,275	
Turnover	Mn BDT	9,327	9,338	-0.1%
	Mn USD	86	86	
Volume	Mn Shares	244	252	-3.1%
No. of Trade		198,627	218,553	-9.1%

* Average Interbank Exchange Rate is BDT 108.50 as of Jul 16, 2023

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Figure: Sectorial Turnover (BDT Mn)

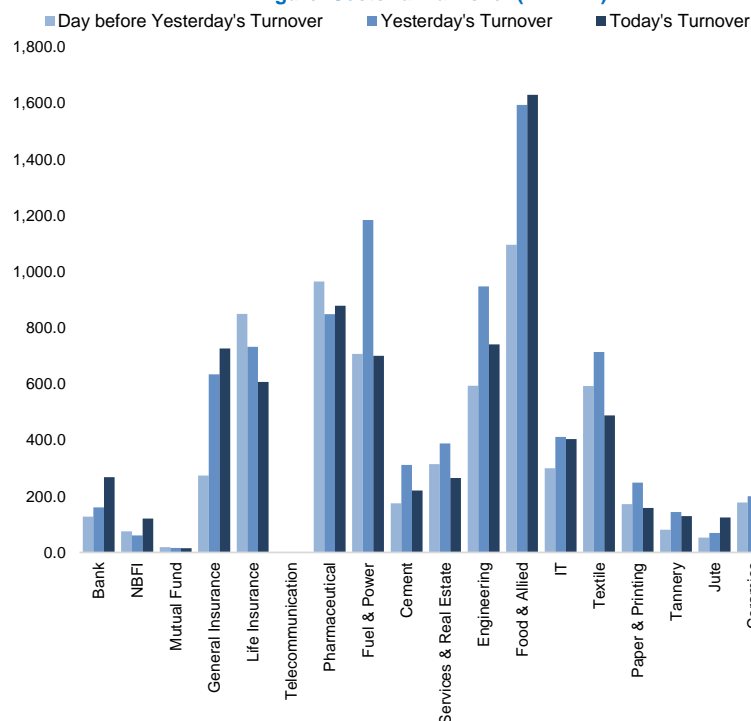
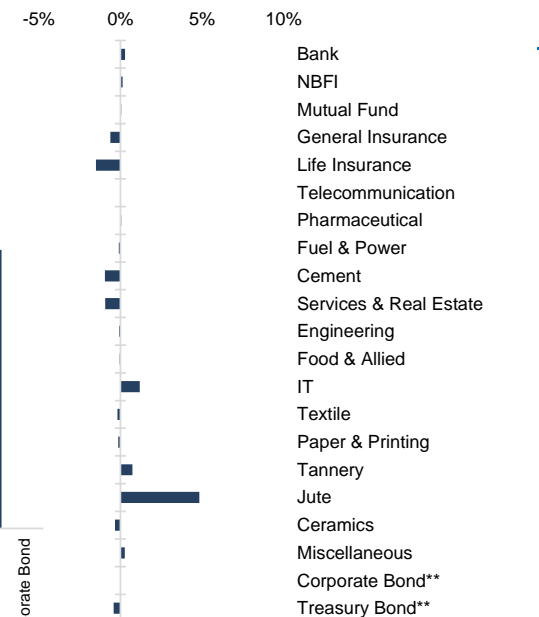


Figure: Sectorial Mcap Change



Market PE 18.8x

Market PB 1.7x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,458	1,454	+4.25	+0.29%	35	687,184	9.3%	267.6	3.1%	11.8x	0.7x	GP	386,996	8.5%	1.1	13.0x	7.2x
NBFI	1,927	1,925	+2.63	+0.14%	23	187,565	2.5%	120.4	1.4%	NM	4.4x	WALTONHIL	317,378	6.9%	0.4	49.1x	3.2x
Mutual Fund	833	833	+0.40	+0.05%	37	37,688	0.5%	15.5	0.2%	NM	0.7x	BATBC	280,098	6.1%	0.9	15.3x	6.9x
General Insurance	3,350	3,370	-20.75	-0.62%	42	97,763	1.3%	726.3	8.5%	17.9x	1.5x	SQURPHARM	188,903	4.1%	121.1	10.0x	1.7x
Life Insurance	2,917	2,962	-44.61	-1.51%	15	81,532	1.1%	606.8	7.1%	NM	NM	ROBI	157,138	3.4%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	1.4	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.2	38.0x	4.6x
Pharmaceutical	3,729	3,727	+2.06	+0.06%	34	723,344	9.7%	878.5	10.2%	19.5x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,706	1,707	-1.54	-0.09%	23	449,864	6.1%	699.8	8.1%	23.6x	1.1x	BEXIMCO	103,571	2.3%	2.6	12.0x	1.2x
Cement	2,629	2,654	-25.30	-0.95%	7	126,254	1.7%	220.2	2.6%	32.1x	2.7x	LHBL	82,109	1.8%	147.9	15.2x	4.1x
Services & Real Est	2,001	2,020	-18.94	-0.94%	8	79,060	1.1%	264.9	3.1%	26.9x	1.0x	BERGERPBL	81,389	1.8%	2.1	27.0x	6.3x
Engineering	4,520	4,524	-3.63	-0.08%	42	530,553	7.1%	740.6	8.6%	72.6x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,764	21,774	-9.39	-0.04%	21	402,722	5.4%	1,629.6	19.0%	20.2x	8.2x	BXPHARMA	65,222	1.4%	0.6	14.6x	1.5x
IT	3,297	3,258	+38.91	+1.19%	11	42,986	0.6%	404.0	4.7%	30.1x	3.1x	BRACBANK	57,596	1.3%	0.3	9.0x	0.9x
Textile	1,645	1,648	-2.96	-0.18%	58	172,238	2.3%	488.3	5.7%	84.9x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,822	10,836	-13.78	-0.13%	6	41,696	0.6%	158.7	1.8%	40.2x	2.1x	ISLAMIBANK	52,486	1.1%	0.1	8.9x	0.8x
Tannery	3,265	3,242	+23.67	+0.73%	6	34,485	0.5%	129.7	1.5%	49.7x	3.4x	DUTCHBANGL	44,203	1.0%	1.7	7.6x	1.0x
Jute	16,728	15,956	+772.64	+4.84%	3	4,092	0.1%	124.2	1.4%	NM	-1420.6x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	695	697	-2.31	-0.33%	5	32,126	0.4%	119.3	1.4%	48.5x	1.9x	UNILEVERCL	39,807	0.9%	1.5	45.2x	13.2x
Miscellaneous	4,170	4,158	+11.15	+0.27%	14	227,021	3.1%	992.0	11.6%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.02%	10	36,590	0.5%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	89	90	-0.37	-0.42%	233	2,850,356	38.4%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIDLANDBNK	15.4	+10.0%	95.3	15.9x	1.2x
INTECH	27.6	+10.0%	18.7	NM	24.4x
AZIZPIPES	121.6	+9.9%	70.5	NM	NM
KBPPWBIL	35.4	+9.9%	647.7	NM	3.0x
JANATAINS	36.0	+9.8%	90.3	25.6x	2.3x
LEGACYFOOT	113.9	+9.4%	107.8	NM	12.8x
CONTININS	36.8	+9.2%	117.1	59.4x	2x
BANGAS	146.3	+7.7%	45.5	NM	7.0x
SONALIANSH	536.4	+7.1%	121.2	NM	4.6x
UNIONCAP	10.7	+5.9%	46.5	NM	NM

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOD	40.0	-8.0%	816.9	NM	10.1x
RUPALILIFE	190.0	-7.4%	103.5	NM	NM
LIBRAINFU	726.4	-6.6%	14.3	NM	0.6x
CENTRALPHL	14.4	-5.9%	66.4	NM	2.5x
SHYAMPSUG	116.3	-5.3%	4.1	NM	NM
LRBDL	39.0	-4.9%	273.3	17.8x	1.0x
FUWANGCER	19.8	-4.8%	95.1	76.2x	1.7x
EASTERNINS	49.1	-4.7%	4.5	14.7x	0.9x
YPL	27.2	-4.6%	85.5	NM	5.1x
DELTALIFE	163.1	-4.4%	262.9	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.1%	10.0x	1.7x
BATBC	74,086	4.3%	15.3x	6.9x
BEXIMCO	69,196	4.0%	12.0x	1.2x
RENATA	68,042	4.0%	38.0x	4.6x
BXPHARMA	45,564	2.6%	14.6x	1.5x
BEACONPHAR	39,617	2.3%	80.9x	9.2x
GP	38,700	2.2%	13.0x	7.2x
BRACBANK	30,976	1.8%	9.0x	0.9x
LHBL	26,980	1.6%	15.2x	4.1x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	18.2x	3.0x
NBL	19,116	1.1%	NM	0.7x
PUBALIBANK	18,314	1.1%	4.7x	0.6x
CITYBANK	18,211	1.1%	5.5x	0.8x
SEAPEARL	16,847	1.0%	31.7x	12.7x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	14.9x	1.1x
PRIMEBANK	14,248	0.8%	5.1x	0.7x
BSRMLTD	14,210	0.8%	NM	0.7x
UPGDCL	13,547	0.8%	16.7x	4.4x

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.
** The base of the Bond index starts at 100, starting from Jan 13, 2022
Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOD	40.0	-8.0%	816.9	NM	10.1x
KBPPWBIL	35.4	+9.9%	647.7	NM	3.0x
RDFOOD	54.5	+3.4%	293.4	44.3x	3.4x
ORIONINFU	384.4	+4.3%	292.4	NM	27.9x
LRBDL	39.0	-4.9%	273.3	17.8x	1.0x
DELTALIFE	163.1	-4.4%	262.9	NM	NM
AOL	37.1	-4.1%	246.0	23.8x	2.0x
WMSHIPYARD	15.1	+3.4%	227.3	NM	0.7x
LHBL	70.7	-1.0%	147.9	15.2x	4.1x
SEAPEARL	219.0	-2.3%	135.4	31.7x	12.7x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RUPALILIFE	212.0	192.0	12.0	1,601	324.87
FORTUNE	82.4	75.3	3.0	1,213	99.76
GP	264.6	261.6	59.0	193	50.60
SEAPEARL	230.0	220.0	2.0	225	49.52
NAVANAPHAR	114.1	108.0	5.0	242	26.27
RDFOOD	51.0	50.5	5.0	350	17.80
GEMINISEA	805.0	805.0	1.0	19	15.30
CNATEX	11.3	11.3	2.0	1,308	14.78
BEXIMCO	105.6	104.1	9.0	94	9.75
GPISPAT	44.8	40.4	10.0	220	9.29

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RUPALILIFE	212.0	192.0	324.9	1,601	12
FORTUNE	82.4	75.3	99.8	1,213	3
GP	264.6	261.6	50.6	193	59
SEAPEARL	230.0	220.0	49.5	225	2
NAVANAPHAR	114.1	108.0	26.3	242	5
RDFOOD	51.0	50.5	17.8	350	5
GEMINISEA	805.0	805.0	15.3	19	1
CNATEX	11.3	11.3	14.8	1,308	2
BEXIMCO	105.6	104.1	9.7	94	9
GPHISPAT	44.8	40.4	9.3	220	10
MARICO	2,366.1	2,365.0	8.8	4	8
NBL	8.0	8.0	7.2	900	9
AL-HAJTEX	176.0	167.5	7.2	41	5
GSPFINANCE	30.3	27.3	6.3	218	4
ANWARGALV	213.0	194.7	5.9	30	11
IFIC	11.0	10.1	4.9	472	9
FAREASTLIF	73.0	70.0	4.7	67	8
BATBC	487.7	479.8	3.7	8	6
DELTALIFE	175.0	154.0	3.6	23	2
PTL	83.9	71.0	3.3	43	5
ORIONPHARM	72.7	72.3	3.2	44	4
BBSCABLES	49.9	46.0	3.0	61	2
Total			739.1		269

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SONARBAINS		5.0%	10%	Record Date	20-Jul-23
PRAGATILIF		0.0%	12%	Record Date	20-Jul-23
UNIONINS		0.0%	10%	Record Date	23-Jul-23
ICICL		0.0%	10%	Record Date	23-Jul-23
EIL		0.0%	7%	Record Date	24-Jul-23
PRIMEINSUR		0.0%	10%	Record Date	30-Jul-23

Important DSE News

CITYGENINS

(Q2 Un-audited): EPS was Tk. 0.81 for April-June 2023 as against Tk. 0.65 for April-June 2022; EPS was Tk. 1.35 for January-June 2023 as against Tk. 1.04 for January-June 2022. NOCFPS was Tk. 1.25 for January-June 2023 as against Tk. 3.34 for January-June 2022. NAV per share was Tk. 19.70 as on June 30, 2023 and 18.57 as on December 31, 2022.

PRIMEBANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.01 for April-June 2023 as against Tk. 0.67 for April-June 2022; Consolidated EPS was Tk. 1.93 for January-June 2023 as against Tk. 1.59 for January-June 2022. Consolidated NOCFPS was Tk. (0.79) for January-June 2023 as against Tk. (1.26) for January-June 2022. Consolidated NAV per share was Tk. 28.56 as on June 30, 2023 and Tk. 26.19 as on June 30, 2022.

MIRACLEIND

With reference to the BSEC letter no. BSEC/SRMIC/95-294/Part-II/137 dated May 23, 2021 and BSEC/SRMIC/95-294/II/110 dated April 18, 2023, Mr. Md. Wahiduzzaman Chowdhury, one of the Directors of Miracle Industries Limited has expressed his intention to sell his entire holding of 10,00,000 shares of the company to Mehmood Equities Limited, a corporate Shareholder of the company through Chittagong Stock Exchange PLC under Negotiated Deal within July 17, 2023.

ROBI

The company has informed that the Board of Directors of the Company has approved to receive a shareholder loan facility from the Axiata Group Berhad for an amount of USD 55,000,000 with a duration of 3 years. The company has further informed that they did not pledge any asset as security and did not create any charge with RJSC in relation to this Loan Agreement.

CENTRALINS

Dr. Jahanara Arzu, one of the Directors of the Company, has further informed that she has completed her buying of 1,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 31.05.2023.

CONFIDCEM

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Confidence Cement PLC' instead of 'Confidence Cement Limited' with effect from July 18, 2023. Other things (except name) will remain unchanged.

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